6/15/88

PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/JUNE 1988

CONSUMER SURVEY: Which packages do consumers like?

Oxygen Absorber Extends Shelf Life

Interphex '88 Show Guide

Glass Line Runs 500/Min

High-Profit Packages

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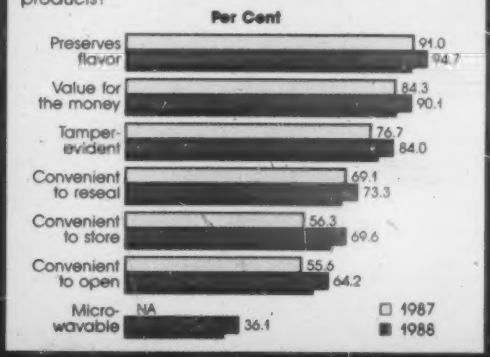
PACKAGING'S EXCLUSIVE SURVEY

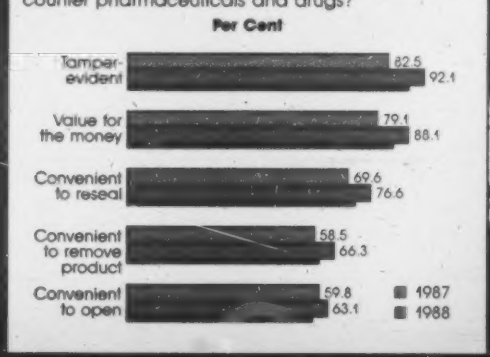
MOST-IMPORTANT PACKAGE FEATURES—FOOD

How important are each of the following characteristics when you are considering purchasing food products?



MOST-IMPORTANT PACKAGE FEATURES—PHARMACEUTICALS

How important are each of the following characteristics when you are considering purchasing over-the-counter pharmaceuticals and drugs?



PACKAGING's 4th Annual Consumer Survey

CONSUMERS GET TOUGH WITH PACKAGING

Americans say they want greater microwavability, tamper-evidence, convenience, and recyclability

By Greg Erickson
Senior Editor

American consumers can't be expected to know all the ins and outs of packaging, but they know what they like. Without question, their attitudes affect the marketing efforts of packaging suppliers and end users everywhere.

To find out what consumers like and dislike about packaging trends, PACKAGING magazine each year conducts a comprehensive Consumer Survey. In preparing this year's study, PACKAGING's editors developed 44 questions pertaining to crucial industry issues. Then, working with NFO Research, Inc., an experienced and respected consumer research firm, PACKAGING distributed the questionnaire to 1,000 households.

A total of 756 consumers responded to the survey—a 75.6 per cent return rate, which NFO termed "higher than average" for surveys of this type. PACKAGING likewise sees the results of the 1988 Consumer Survey as above average in terms of the reliability and usefulness of the data. The results are accurate to within plus-or-minus 4 per cent.

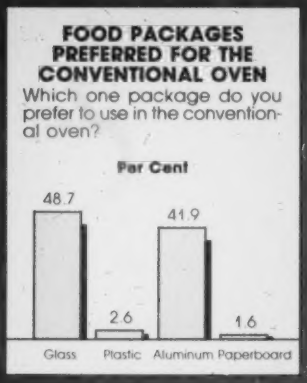
The full report contains a vast amount of information about the entire sample group as well as consumers in nine "lifestages" categories, four geographic divisions, four age groups, and four income groups.

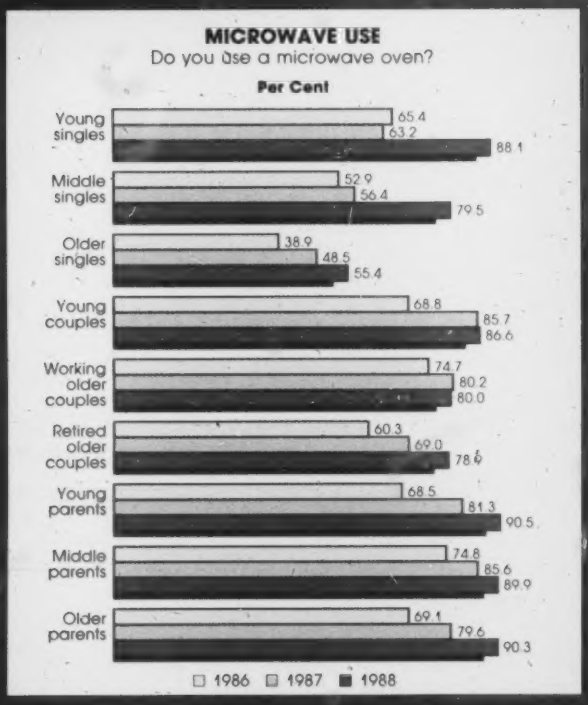
Space does not permit discussion of all the findings. (See the box at the end of this article for more information about the complete 400-page report.) Here are highlights.

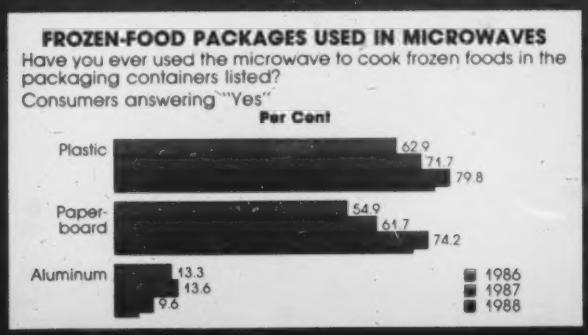
What do American consumers really think about packaging? This year, of the 1,000 households contacted, 756 responded. Their opinions are informative . . . even astonishing.

25%

more young singles used a microwave oven this year than in 1987







Use of microwave ovens increased among survey respondents by almost 10 per cent 1987-1988, to 83.1. The greatest increases in microwave use 1987-88 were within two lifestages: Young Singles, up 24.9 per cent, and Middle Singles, up 23.1 per cent. Increases of roughly 10 per cent also occurred in lifestages Retired Older Couples, Young Parents, and Older Parents.

Frozens in the microwave

Which packaging materials do consumers use for their microwave cooking? For frozen foods, nearly 80 per cent of the respondents said they used plastic containers; 74.2 per cent used paperboard. Less than 10 per cent said they used aluminum.

PACKAGING asked, "Which one package do you prefer to use in the microwave oven?" Almost half the consumers checked glass. This response was surprising because so few foods promoted as microwavable are now packaged in glass. It is possible that some of the consumers misunderstood the question. However, it is also possible that the respondents really did want to say they would prefer glass packaging for microwavable foods: Elsewhere in the survey, respondents reported a strong preference for glass as a food-packaging material.

Other food-packaging materials and the percentages of respondents who said they preferred them for use in the microwave: plastic, 33.3 per cent; paperboard, 10.7 per cent; aluminum, 1.1 per cent.

Use of aluminum as a container material for frozen foods cooked in conventional ovens ran to 80 per cent. About 30 per cent of the respondents said they used paperboard containers in this way; more than 22 per cent said they used plastic.

When asked to choose just one preferred food container material for use in the conventional oven, almost half of the 756 respondents again picked glass. Factors that affected the responses for microwavable foods packaging may have come into play here also.

About 42 per cent picked aluminum for the conventional oven; less than 3 per cent said they preferred either plastic or paperboard.

Another surprise

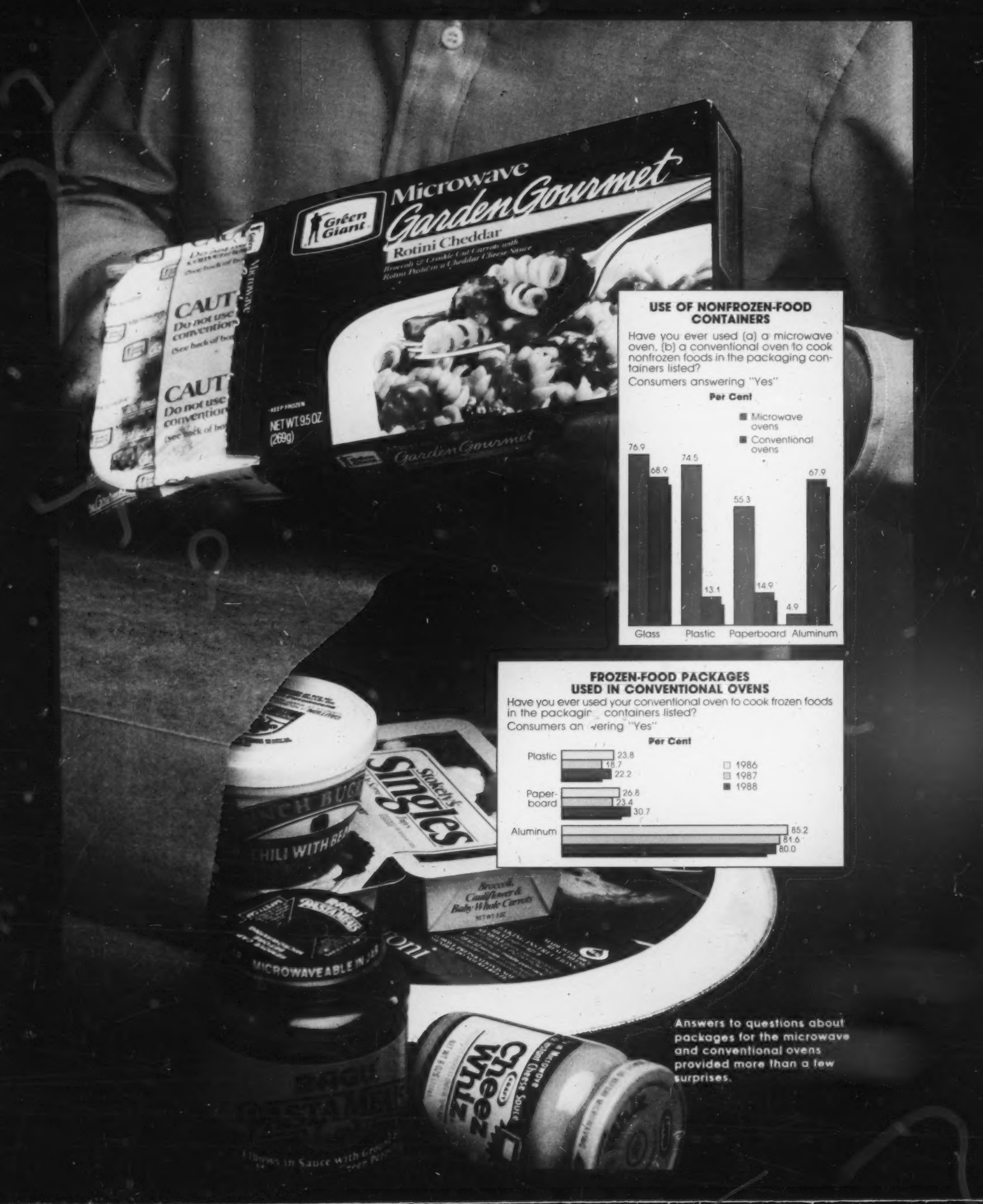
PACKAGING asked consumers which packaging materials they preferred for a variety of foods. A surprise appeared in the responses for soup. More than 61 per cent of the 1988 respondents said they preferred plastic containers—almost five times as high a percentage as said so last year. Metal came in second in 1988, with 25 per cent; glass followed with 10.8. In 1987, metal cans took 66.7 per cent; glass jars, 14.8 per cent; plastic containers, 12.8.

To verify the validity of this dramatic change in preference, PACKAGING reported the 1987-1988 figures to a spokesperson for a major soup-processing company, which still packages by far the largest portion of its soups in metal cans. He, too, called the results surprising, but not wildly so.

The spokesperson offered three reasons why the switch in preference from metal to plastic seemed logical to him: (1) a growing consumer feeling that soups in cans are overcooked and somehow "artificial"; (2) an increasing consumer demand for packages that eliminate the need for can openers, pots and pans, and bowls; and (3) the microwave explosion.

Glass received preference votes from 44.3 per cent of the 1988 respondents for cooked pasta—nearly as many as for plastic, metal, and paperboard containers combined.

For soft drinks, glass was favored by more than 41 per cent of the consumers, metal and plastic by 28.6 and 26.3 per cent, and paperboard by



USE OF NONFROZEN-FOOD CONTAINERS

Have you ever used (a) a microwave oven, (b) a conventional oven to cook nonfrozen foods in the packaging containers listed?

Consumers answering "Yes"

FROZEN-FOOD PACKAGES USED IN CONVENTIONAL OVENS

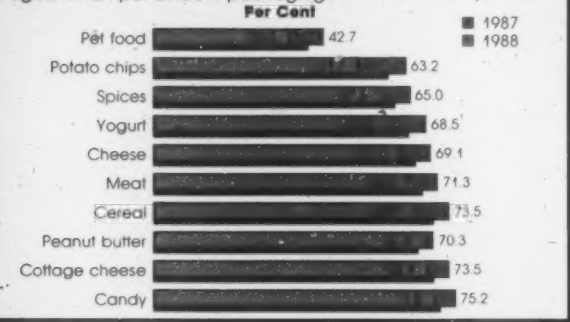
Have you ever used your conventional oven to cook frozen foods in the packagir containers listed?

Consumers an vering "Yes"

Answers to questions about packages for the microwave and conventional ovens provided more than a few surprises.

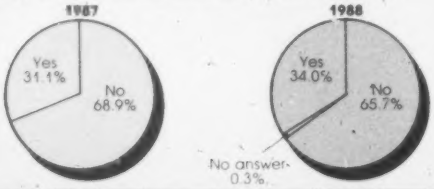
WHICH FOODS SHOULD BE TAMPER-EVIDENT?

Which of the following types of foods do you feel should be packaged in tamper-evident packaging?



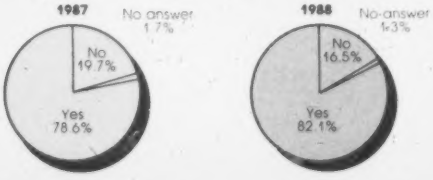
PRODUCT REJECTIONS BECAUSE OF TAMPERING

During the past six months, have you avoided purchasing any pharmaceuticals or food products because the product package appeared to have been tampered with?



LOOKING FOR SIGNS OF TAMPERING

When you last purchased a pharmaceutical or food product, did you check for evidence of tampering?



FOOD PACKAGE MATERIALS RATINGS

Assuming that products were available in all of the following package types, which type of container would you prefer for each of the food products listed?

	Glass		Plastic		Metal		Paperboard		No Answer	
	'88	'87	'88	'87	'88	'87	'88	'87	'88	'87
Soup	10.8	14.8	61.2	12.8	25.0	66.7	0.9	1.4	2.0	4.3
Cooked pasta	43.3	46.6	20.6	19.8	17.7	16.0	8.5	5.5	4.9	9.2
Beef stew	30.0	29.3	12.7	13.6	51.5	47.2	2.6	0.8	3.2	9.2
Ground coffee	13.0	16.5	11.2	15.3	63.4	55.2	8.9	6.1	3.6	6.9
Tuna fish	6.9	9.8	7.8	10.1	82.4	74.6	0.5	1.0	2.4	4.4
Tomato sauce	30.4	30.0	10.3	14.8	54.9	44.9	2.5	3.5	1.9	6.3
Vegetables	20.4	25.8	17.5	18.2	51.5	45.5	8.7	4.7	2.0	5.8
Fruit	34.0	40.5	17.7	18.6	40.7	31.5	4.4	3.3	3.2	6.1
Soft drinks	41.3	34.3	26.3	28.0	28.6	30.5	1.1	2.1	2.8	5.1
Beer	45.1	39.5	4.9	7.2	36.8	34.1	0.8	1.0	12.4	18.2
Wine	81.1	68.9	4.2	7.9	2.2	4.0	1.5	1.5	11.0	17.6
Juice drinks	55.2	NA	19.6	NA	11.5	NA	11.9	NA	1.9	NA

82%

of all respondents checked for signs of tampering when they shopped

1.1 per cent.

As a beer package, glass won out over metal by 8.3 percentage points nationwide. Regional differences were significant: The highest percentage selecting glass—55.8—appeared among residents of the Northeast. The highest percentage preferring metal—44.7—came from the North Central region. Beer-container preferences differed also by lifestage. The percentage of Young Singles who said they preferred glass was the highest of any age category: 71.4. The highest percentage of votes for metal —44.6—came from the Older Singles group.

Glass remained the preferred package for wine. At more than 81 per cent, the 1988 preference rating for glass bottles was up by roughly 12 points from '87. (Most of the increase might be attributable to a smaller percentage of "don't know/no answer" responses this year.)

New category: juice drinks

For 1988 PACKAGING added a new beverage type, juice drinks. Well more than half the respondents said they preferred glass containers for these beverages. And plastic, receiving nearly 20 per cent of the preference vote, beat out metal and paperboard by roughly 8 percentage points each.

Among container materials for ground coffee, the 1987-1988 preference for metal increased by 8 points to almost two-thirds of the respondents while preference for plastic and glass dropped.

Metal containers also received the highest percentages of preference votes for beef stew, tuna fish, tomato sauce, vegetables, and fruit. More than 8 per cent of all respondents said they preferred paperboard as a packaging material for cooked pasta, ground coffee, and vegetables.

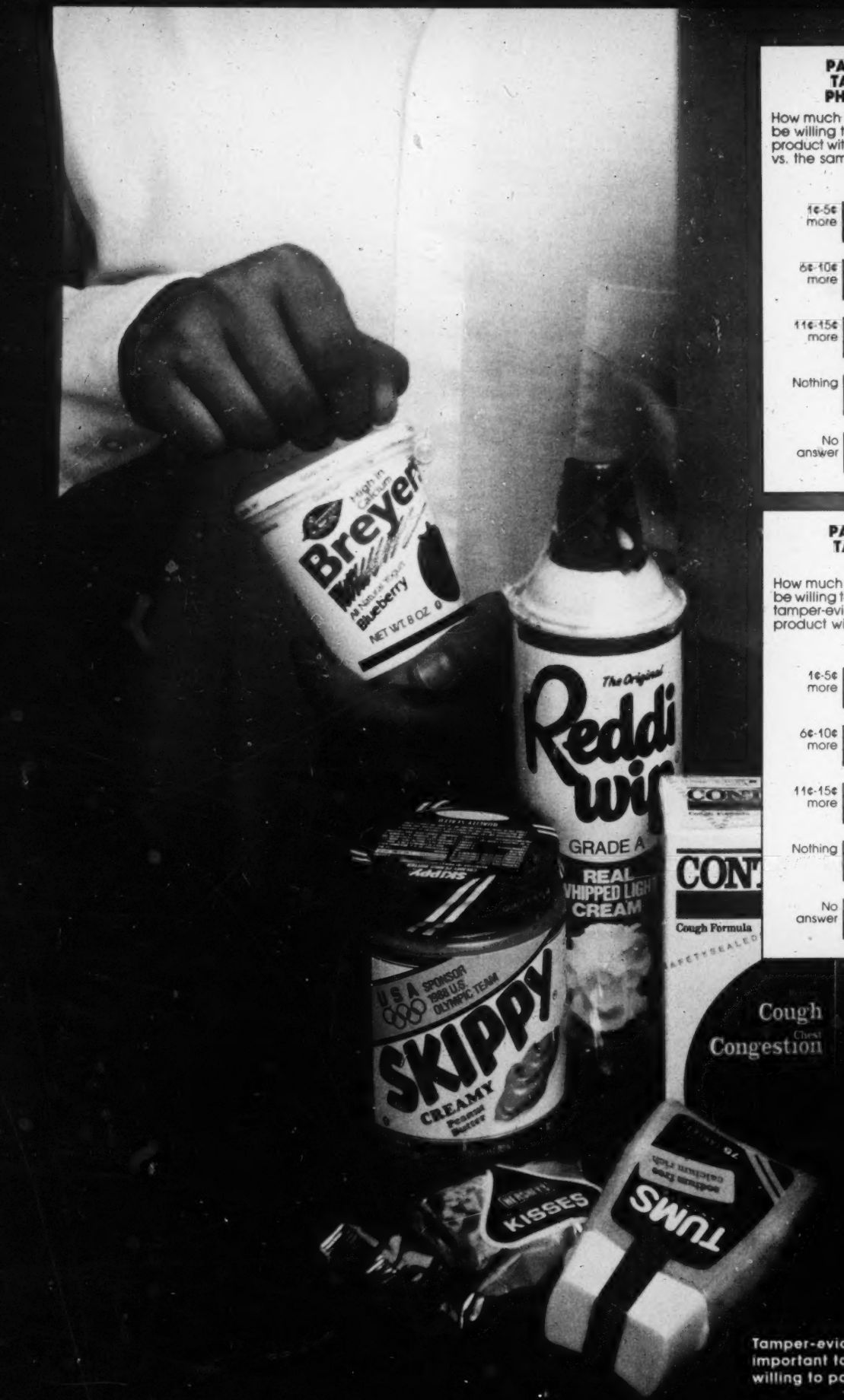
Given an opportunity to list foods they felt should be sold in tamper-evident packaging, consumers responded this year much as they did last year. The percentages ran highest to lowest in this order: candy, cottage cheese, peanut butter, cereals, meat, cheese, yogurt, spices, potato chips, pet food.

In 1987, less than 79 per cent of the survey respondents said they had looked for signs of product tampering when they shopped. In 1988, slightly more than 82 per cent said so. And the percentage of consumers who reported that they had avoided purchasing a product within the past six months because it appeared to have been tampered with rose by 3 points 1987-1988 to 34.0.

More proof that tamper evidence is still on the consumer's mind: Requested to rate the importance of various packaging characteristics, the respondents put tamper-evident packaging at or near the top. More than 92 per cent of the respondents said tamper-evident packaging was "extremely/very important" for pharmaceuticals packaging; 84.0 per cent said so regarding foods packaging.

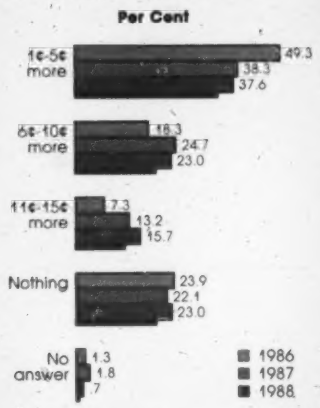
Other pharmaceuticals packaging traits and their percentages of "extremely/very important" ratings were: value for the money, 88.1; convenient to reseal, 76.6; convenient to remove product, 66.3; convenient to open, 63.1. Other food packaging traits and percentages of respondents rating them "extremely/very important" were: preserves flavor, 94.7; value for the money, 90.1; convenient to reseal, 73.3; convenient to store, 69.6; convenient to open, 64.2, microwavable, 36.1.

How much more are consumers willing to pay for all this tamper-evident packaging? PACKAGING asked that question in 1986, 1987, and again in '88. Although the percentages have changed year to year, no pattern has emerged. The closest thing to



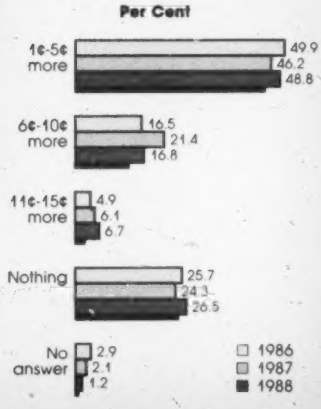
PAYING EXTRA FOR TAMPER-EVIDENCE PHARMACEUTICALS

How much more, if anything, would you be willing to pay for a pharmaceutical product with tamper-evident packaging vs. the same product without it?

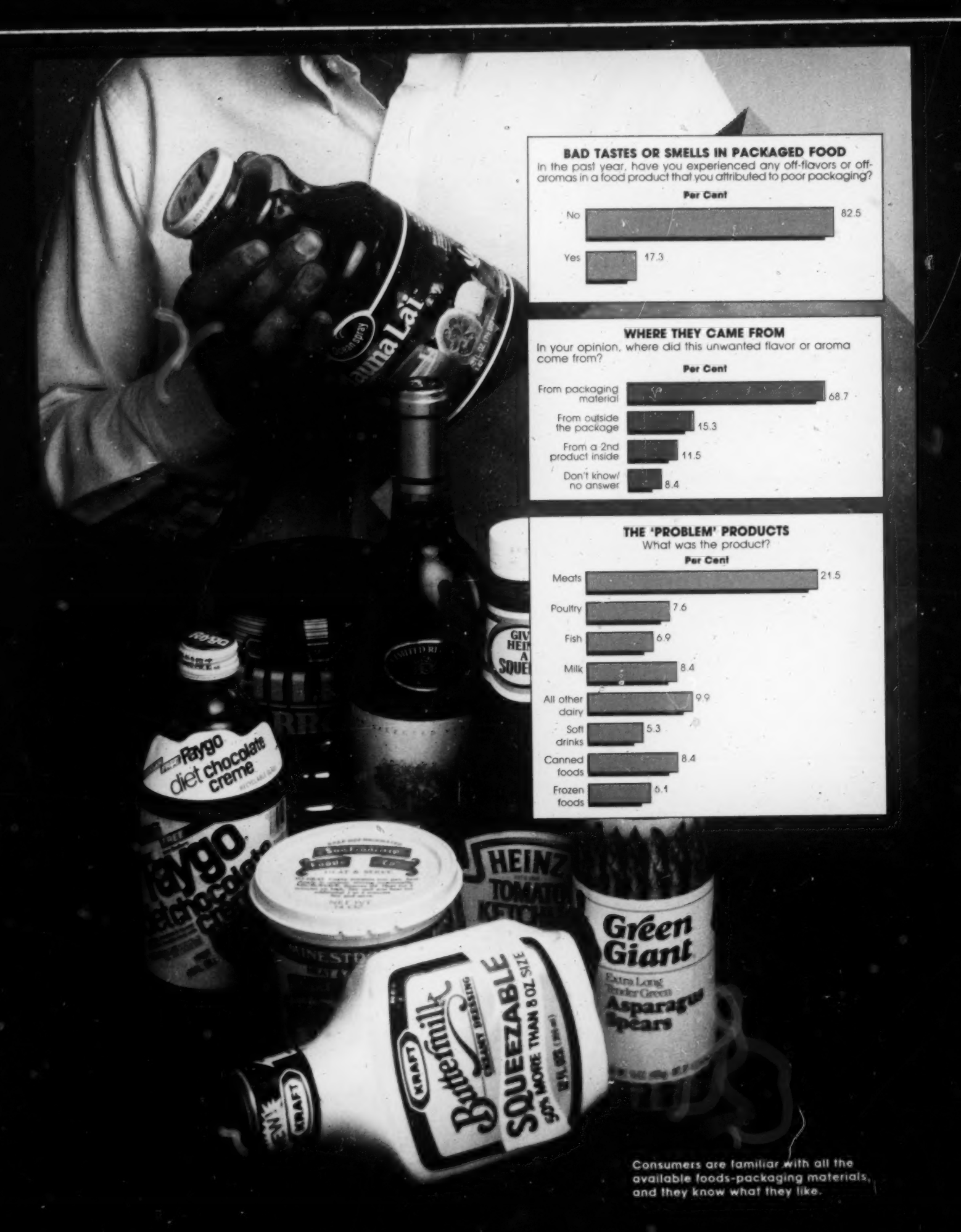


PAYING EXTRA FOR TAMPER-EVIDENCE FOOD

How much more, if anything, would you be willing to pay for a food product with tamper-evident packaging vs. the same product without it?



Tamper-evident packaging is still important to consumers, and they're willing to pay for it.


BAD TASTES OR SMELLS IN PACKAGED FOOD
In the past year, have you experienced any off-flavors or off-aromas in a food product that you attributed to poor packaging?
Per Cent
No 82.5
Yes 17.3
WHERE THEY CAME FROM
In your opinion, where did this unwanted flavor or aroma come from?
Per Cent
From packaging material 68.7
From outside the package 15.3
From a 2nd product inside 11.5
Don't know/ no answer 8.4
THE 'PROBLEM' PRODUCTS
What was the product?
Per Cent
Meats 21.5
Poultry 7.6
Fish 6.9
Milk 8.4
All other dairy 9.9
Soft drinks 5.3
Canned foods 8.4
Frozen foods 6.1
Faygo diet chocolate creme
HEINZ
Green Giant
Extra Long Tender Green Asparagus Spears
KRAFT
Buttermilk
SQUEEZABLE
50% MORE THAN 8 OZ SIZE

Consumers are familiar with all the available foods-packaging materials, and they know what they like.

17%

experienced off-flavors and off-aromas in poorly packaged food

a trend is this: The percentage of consumers who said they were willing to pay an additional 11-15 cents for tamper-evident packaging has more than doubled to nearly 16 for pharmaceuticals and has risen from 4.9 to 6.7 for food.

The 1988 survey also included questions about shelf-stable cooked meat and irradiated foods.

One of them was, "If precooked meat could be packaged without preservatives so that you could store it outside the refrigerator for a week, would you buy it?" The responses were: definitely would, 11.1 per cent; probably would, 16.9; might or might not, 38.0; probably would not, 19.2; definitely would not, 14.2.

Another question was, "How likely would you be to try a food product that had been irradiated to preserve freshness?" The largest percentage of the respondents—38.2—said they probably or definitely would not try it. Slightly more than 37 per cent said they were undecided, and 22.6 per cent said they probably or definitely would try irradiated food.

Also part of the 1988 questionnaire—as well as the 1987 one—was a series of inquiries about squeeze bottles for foods.

The percentage of consumers who said they had purchased ketchup, mayonnaise, jelly, or salad dressing in squeeze bottles increased overall 1987-88—led by a jump for ketchup of 13.9 and one for salad dressing of 11.4. For all foods except salad dressing, the percentage of squeezables purchasers in the 65-plus age group was the lowest; for all products except jelly, the percentage in the under-25 group was highest.

The 136 consumers who said they had not purchased any food products in squeeze bottles explained why by checking one or more reasons listed on the questionnaire. Almost 70 per cent marked "I like glass better," 33.8 per cent checked 'they are expensive," and 14.7 per cent chose "haven't seen them." Last year, the per cent that chose "haven't seen them" was 21.2.

Only 17.3 per cent of the 756 survey respondents said they had experienced off-flavors or off-aromas in foods that had been packaged poorly. PACKAGING asked those 131 consumers where they thought the unwanted taste or odor had come from. Almost 69 per cent of them said it had come from the packaging material itself; 15.3 per cent said it had come from something outside the package; 11.5 per cent said it had come from one product packaged inside another.

Asked to write in the type of "problem" product, more than 20 per cent of those 131 respondents wrote in meat; 9.9 per cent wrote in dairy products other than milk. Less than 9 per cent listed any of the following: milk, canned goods, poultry, fish, frozen foods, soft drinks.

PACKAGING also asked consumers to rate various aspects of food labels. The characteristics listed on the questionnaire and the percentages of consumers rating them "excellent/good" were: listing of ingredients, 83.7; directions for product preparation, 74.6; nutrition information, 62.7; accuracy of photo with respect to the product, 38.1; information about additives, 36.1.

Interest in recycling

Considering that the role of post-consumer packaging in waste-management problems is being closely scrutinized, PACKAGING allocated nearly a full page of the four-page questionnaire to recycling for 1988.

One of the questions PACKAGING asked in '88 has been part of the questionnaire for three consecutive years: "How important is recycling to you?" Each time, about 30 per cent of the respondents said recycling was "extremely important" to them, roughly 50 per cent said it was "somewhat important," about 15 per cent said it was "not very important," and 3 per cent said it was "not at all important."

However, between 1986 and 1988, the percentage of consumers who said that they "often" considered the recyclability of packaging materials when making a product-purchase decision rose from 8.7 to 15.2. The percentage that reported they "sometimes" considered it also rose —from 27.5 to 33.2 per cent.

Consumer perception of the ease with which various packaging materials can be recycled may affect purchasing decisions. Here are the materials listed in PACKAGING's questionnaire and the percentages of consumers who called them "very easy/easy" to recycle: aluminum, 83.9; paper, 75.0; glass, 55.4; steel, 40.5; plastics, 37.3.

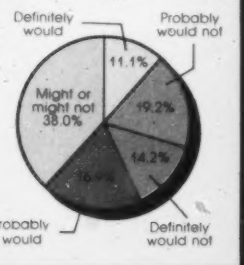
PACKAGING also asked consumers to rate manufacturers of packaging materials on how good a job the manufacturers were doing in recycling their materials. Aluminum companies received "very good/good" ratings from 73.7 per cent of the respondents; paper manufacturers got that rating from 52.9 per cent; glass companies received 46.6 per cent; steel makers got 29.9 per cent; plastics companies garnered 25.4 per cent.

Recycling funds

Who should fund new recycling programs? It's a sticky question. In the end, consumers will no doubt have to contribute, but PACKAGING didn't give them a chance to volunteer. Instead, the questionnaire listed only four choices and got these responses: private trash-collection agencies, 11.9 per cent; local, state, or federal governments, 20.6 per cent; manufacturers of the packaged products, 25.3; manufactur-

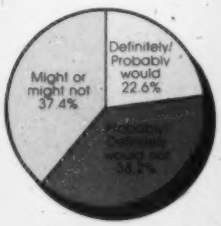
WHO WOULD BUY SHELF-STABLE COOKED MEAT?

If precooked meat could be packaged without preservatives so that you could store it unopened outside the refrigerator for a week, would you buy it?



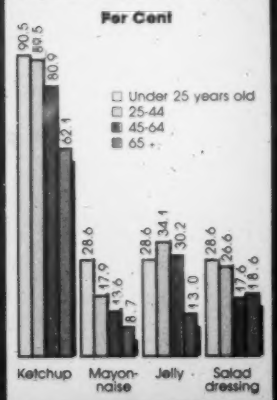
WHO WOULD TRY IRRADIATED FOOD?

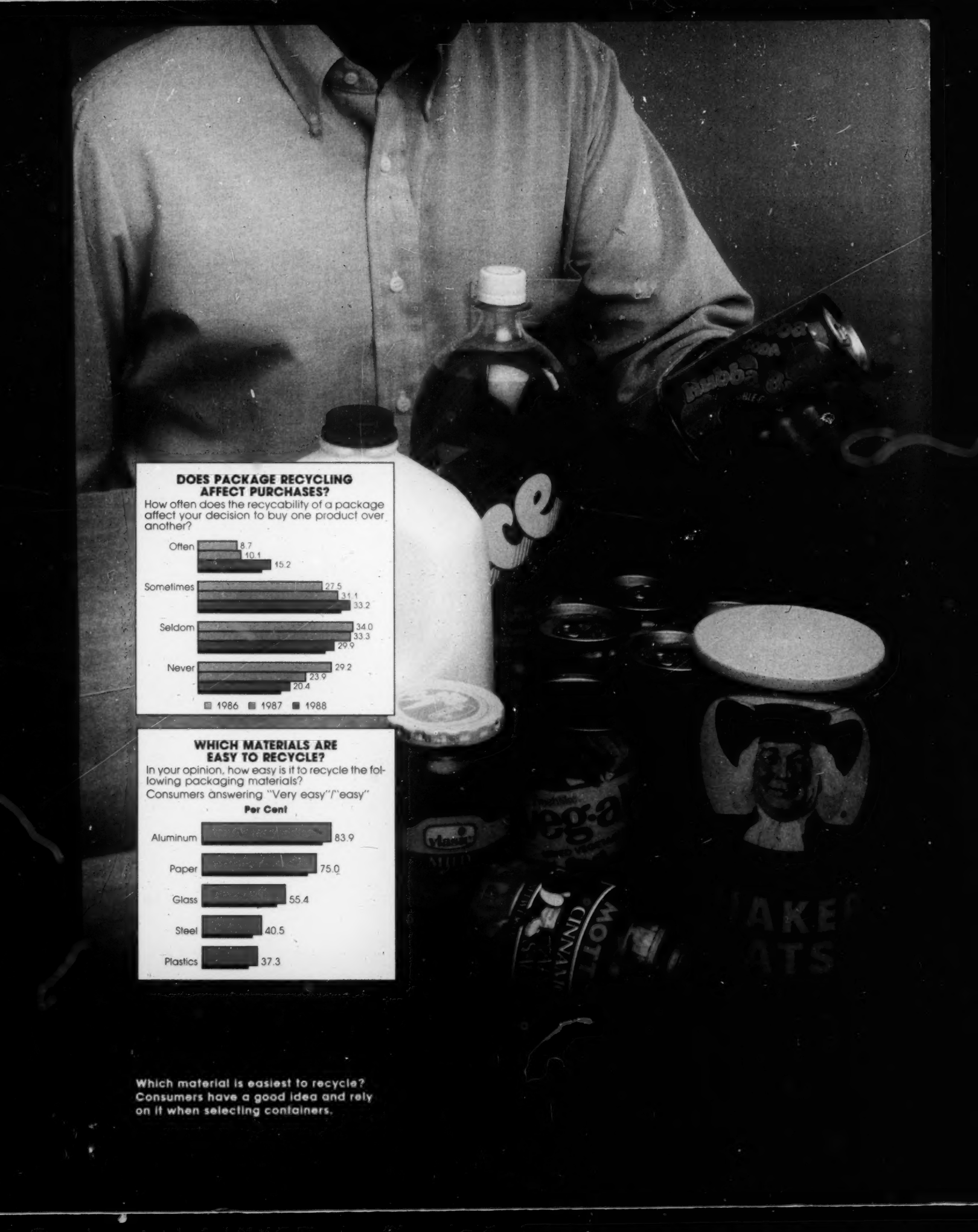
How likely would you be to try a food product that had been irradiated to preserve freshness?



FOODS PURCHASED IN SQUEEZE BOTTLES

Please indicate if you have ever purchased any of these products packaged in plastic squeeze bottles.





Which material is easiest to recycle? Consumers have a good idea and rely on it when selecting containers.

79%

of consumers aged 65-plus would sort their trash for recycling

ers of the packaging materials, 36.8.

PACKAGING also asked consumers where all the discarded packaging should go and offered only two choices: "Bury it in public landfills," or "Burn it in public incinerators." More than 19 per cent of the respondents from the Northeast, 25.8 per cent from the North Central region, 36.6 per cent from the South, and 41.7 per cent from the West voted for landfilling. Incineration was favored by 77.6 per cent of the respondents from the Northeast, 68.4 per cent from the North Central region, 59.5 per cent from the South, and 52.8 per cent from the West.

Many environmentalists see consumer sorting of used packaging materials for curbside pickup and recycling as a way to reduce the volume of waste that must be either dumped or burned. PACKAGING's 1988 Consumer Survey revealed that willingness to do this ran high generally, though it differed among age groups.

Less than 66 per cent of respondents under 25 years of age said they would sort their trash to remove recyclable packaging materials; 72.4 per cent of those aged 25-44 said they would; 76.4 per cent of those 45-64 would do so, and 78.9 per cent aged 65 or over would.

Regional differences were apparent, too. The smallest percentage of consumers willing to sort—69.5—came from the North Central region. The largest percentage—81.9—came from the West.

A controversial means of removing recyclable used packaging from the waste stream is the beverage-container deposit law or "bottle bill." PACKAGING isolated those consumers who lived in states that did not have bottle bills and asked them whether they would support deposits on nonrefillable soft-drink and beer containers. The percentage of "yes" responses varied by region: 62.7 from the Northeast, 61.5 from the West, 43.4 from the North Central region, and 39.3 from the South.

It is conceivable that such deposits could be placed on all other containers including soup cans, milk bottles, and pickle jars. Did the consumers feel such a law would be a good idea? Across all age and lifestyle groups, the ratio of no to yes votes was approximately two to one. However, more than 40 per cent of the young singles said they would support a law requiring deposits on all other containers made of metal, glass, and plastic. The highest percentage of no votes—79.8—came from the middle-age parents group. ■

FOR MORE INFORMATION

Information contained in this article was condensed from more than 400 pages of data in the 1988 Consumer Survey. The complete study contains answers to 44 questions related to packaging. It is available for $175. For more information, contact Consumer Survey Editor, PACKAGING magazine, Cahners Publishing Co., 1350 E. Touhy Ave., Des Plaines, Ill. 60018, or circle No. **478** on the Reader Service Card.

PLEASE RATE THIS ARTICLE

How would you rate this article? To reply, circle the appropriate number on the reader service card:

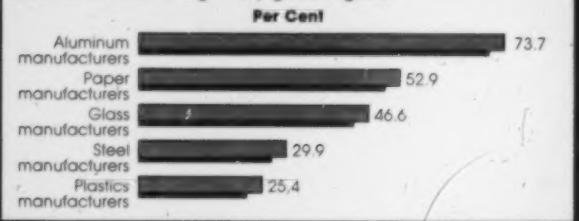
Outstanding	479
Above Average	480
Average	481
Below Average	482

GREG ERICKSON
Senior Editor

"It's clear from the results of this survey that American consumers are perceptive and discerning. Their opinions are something that all professionals in the packaging industry ought to consider."

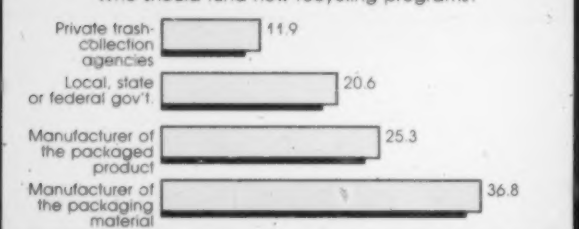
WHO'S DOING A GOOD JOB WITH RECYCLING?

In your opinion, how good a job of recycling packaging materials are the following companies doing?
Consumers answering "Very good"/"good"



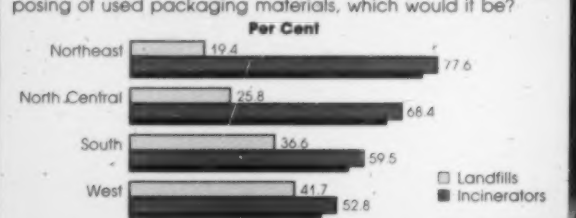
WHO SHOULD PAY FOR RECYCLING?

Who should fund new recycling programs?



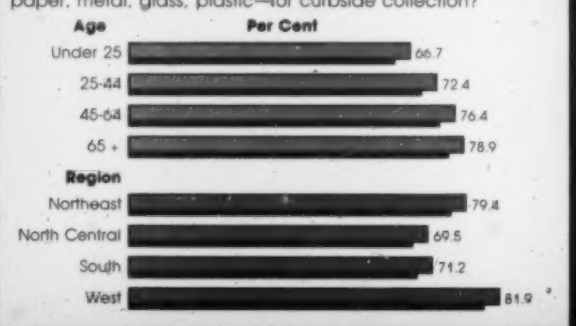
WHERE SHOULD THE TRASH GO?

If you had to choose only one of the following methods of disposing of used packaging materials, which would it be?



WHO WILL SORT USED PACKAGES FOR RECYCLING?

Are you willing to separate used packaging materials by type—paper, metal, glass, plastic—for curbside collection?



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PACKAGING

THE CANNERS MAGAZINE FOR DECISION-MAKERS/JULY 1988

TOP 100 GIANTS IN PACKAGING

Ethylene Crisis Alarms Industry

Microwave Package Broils Bacon Cleanly

On-Pack Coupons Sell Product

Packaging Line Runs 3,000 Different Items